

2008 PADDLE TOURISM STUDY



NORTH CAROLINA STATE TRAILS PROGRAM



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MANAGEMENT INTERNSHIP PROJECT

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Snapshot of Results

The North Carolina State Trails Program conducted the Paddle Tourism Study as part of an ongoing effort to enhance and encourage paddling experiences in North Carolina. The study was conducted from June to September 2008; respondents were primarily individuals who paddle in North Carolina. The survey captured important information about the characteristics of North Carolina paddlers and their level of spending on paddling trips. This executive summary provides a brief review of the study's overall findings.

- North Carolina is a destination for paddlers from surrounding states. The greatest numbers of responses from outside North Carolina were from Georgia, South Carolina, Tennessee, and Virginia
- The majority of participants in this survey (70%) believe that paddling is a viable form of economic development for North Carolina.
- Respondents spent almost one million dollars (\$947,800) last year on paddle trips outside their local area.
- Respondents spent nearly \$300,000 last year on trips within their local area.
- Kayaks dominated paddlers' choice of craft. Over half of survey participants (58%) indicated they use their own kayak when they go paddling.
- Over half of all survey participants (56%) considered themselves recreational paddlers. Another 27% considered themselves avid paddlers and 17% considered themselves novice paddlers.
- The Piedmont was the most frequently paddled region of North Carolina, visited by 39% of respondents. However, 86% of respondents were from the Piedmont.
- The Neuse was the most popular river to paddle in North Carolina (named by 306 respondents as the body of water they most frequently paddle), followed by the Cape Fear River (255 respondents) and the Nantahala (254 respondents).
- Two-thirds of respondents (66%) indicated they typically paddle with their friends. Over one third (38%) indicated they also paddle by themselves. (Respondents were able to select more than one type of travel party.)
- Respondents indicated the majority of their paddling trips (67%) were first and foremost for paddling. Paddling while on vacation was the next most reported context for paddling trips.
- Survey participants who considered themselves avid paddlers took an average of 17 paddle trips last year **within 50 miles of their home**. Recreational paddlers reported an average of eight trips, and novice paddlers reported an average of four.

- Survey participants who considered themselves avid paddlers took an average of nine paddle trips last year **farther than 50 miles of their home**. Recreational paddlers reported an average of six trips, and novice paddlers reported an average of six.
- Most respondents (41%) indicated driving 30 minutes or less from their home to begin their last paddling trip.
- When spending the night away from home on a paddling trip, the favorite forms of lodging were campsite camping, followed by primitive camping, followed by staying with friends and relatives. However, many paddlers noted that their trips are day trips only.
- Respondents were asked about their top concerns when on a paddle trip. Almost three-fourths of respondents reported being concerned with the quality and safety of access sites (73%) and adequate water level (72%).
- Viewing wildlife (91%) and being away from the city (88%) represented the top two elements of paddling trips most enjoyed by respondents.
- Over three quarters of respondents (77%) rely on word of mouth to plan their paddling trips. Other top sources for planning include Internet (69%), and books (43%).
- Respondents were asked to select additional outdoor recreation activities they participate in. The most popular among respondents were hiking (82%), camping (73%) and walking/running (71%).
- Almost two-thirds of respondents (64%) support additional funding for paddle access and trail development. One-third (36%) reported they would not support any of the listed funding sources for improved and increased paddle access and trail development. Out of the four choices, the most supported (33%), was user fees.
- Almost half of all respondents (45%) reported they work in the public sector. Nearly one-third (32%) indicated they work in the private sector.
- Over one-quarter (27.9%) of respondents reported a household income of \$100,000 or more.

Introduction

In 2008, the North Carolina State Trails Program conducted an online survey to collect information about the growing interest in paddling North Carolina waters. This study is a effort to quantify user needs and positive economic impacts of paddle tourism in North Carolina. The State Trails Program will use information obtained through this study to promote a paddle trail system which is legal, safe, sustainable and enjoyable to the paddling public.

Specific goals of the study were to gain information about:

- **Paddlers who recreate in North Carolina: demographics, level of paddling, desired amenities, trip patterns, planning sources, other activities, and expenditures**
- **Paddling/outfitting businesses/guides who operate in North Carolina, as well as organized outdoor clubs and organizations that promote paddle trips within North Carolina.**

The following report outlines the study methodology and results that will benefit all involved in planning, developing and marketing paddle trails and paddle tourism across North Carolina.

Methods

A 26-question survey was designed to assess trip qualities desired by paddlers, and to measure paddlers' economic impacts on North Carolina's local communities. This survey was adapted to an electronic format using the online software program SurveyMonkey. To maximize response rate, the electronic survey was distributed in the following ways:

- A link to the survey was placed on the North Carolina Division of Parks and Recreation website.
- The survey announcement and link was distributed on various listservs including, NC-1, Environmental Education listserv, NC Plan listserv, and the NC Agritourism Networking Association listserv.

- The North Carolina Department of Environment and Natural Resources sent the survey out to their email list, as did NCSU Tourism Extension, which includes all 101 Cooperative Extension Centers and the NCSU College of Natural Resources faculty.
- The Conservation Fund announced the study in their Resource Communities e-Newsletter.
- The Haw River Assembly placed a link to the survey on their website.
- The North Carolina Division of Tourism announced it in the NCDTFSD NewsLink.
- An email announcement describing the purpose and goals of the study with a link to the survey was sent to a number of destination marketing organizations (DMOs) throughout North Carolina. The DMOs were encouraged to pass the survey along to their board of directors, as well as communities and paddle groups within their service region.
- A database of North Carolina paddle outfitters was created. These outfitters were mailed a letter from Darrell McBane, State Trails Program Coordinator, requesting their assistance distributing the survey. Outfitters were also contacted by phone to ask for their support. Once the outfitters agreed to participate in the study, they were sent informational brochures about the study to give to their clientele, as well as sign-up sheets on which their clientele could provide their email addresses. The sign-up sheets were then mailed back to the State Trails Program office and the signees were emailed the link to the survey. Several outfitters announced the survey in their newsletters and on their websites. The following outfitters were instrumental in distributing the survey:
 - Barrier Island Kayaks
 - Endless River Adventures
 - Fish Stalkers Outfitters
 - Frog Hollow Outdoors
 - GetOutdoors
 - God's Country Outfitters
 - Great Outdoor Provision Company
 - Hanging Rock Outdoor Center
 - Haw River Canoe and Kayak Co.
 - Headwaters Outfitters
 - Herring's Outdoor Sports
 - High Mountain Expeditions
 - Huck Finn River Adventures
 - Paddle Pamlico Kayak Outfitters
 - Riverside Canoe and Tube
 - Southern Waterways
 - The Adventure Company

- Troublesome Creek/Three Rivers Outfitters
 - Uwharrie Tours
 - White Oak River Outfitters
 - Zaloo's Canoes
- The distribution strategy used for outfitters was also used to gain assistance from North Carolina State Parks with paddle rental facilities and water access.
- Paddle clubs were sent an email announcement with a link to the survey to pass along to their members.
- The North Carolina Paddle Trail Association forwarded the survey link to their members.

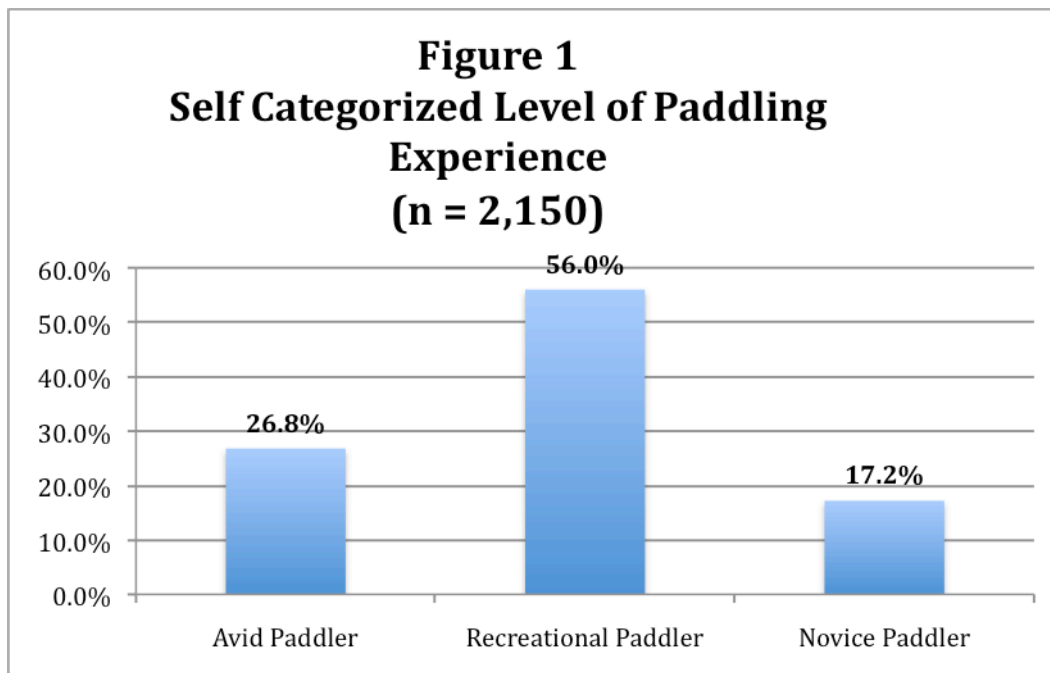
Over a period of 130 days (May 20 to October 1, 2008) 2,153 responses were collected. While most responses came from individuals in North Carolina, several other states were represented.

Results

The results of the 2008 North Carolina Paddle Tourism Survey are reported below. Questions are listed in the same order as in the survey.

1.) Would you describe yourself as a (n):

Respondents were asked to categorize themselves as an avid, recreational, or novice paddler. Over half of respondents, 56.3%, categorized themselves as recreational paddlers.

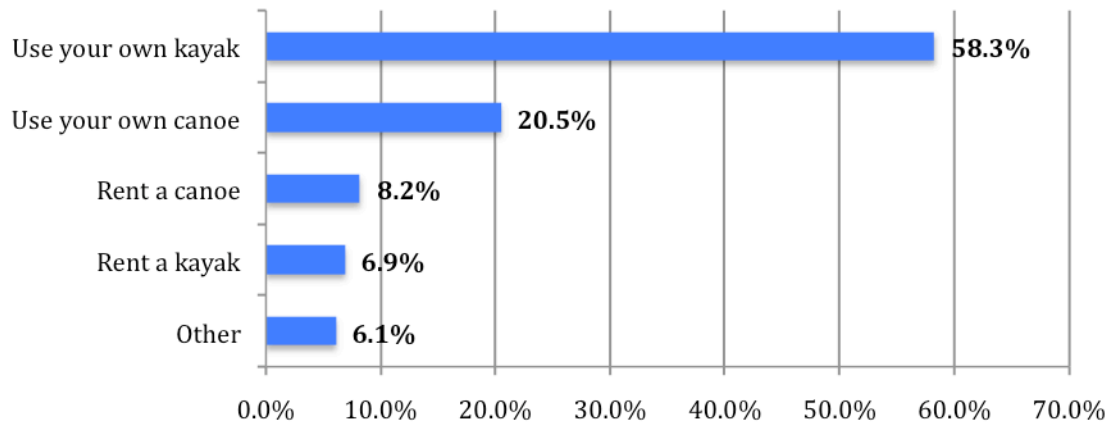


2.) When you go paddling do you...(Check the response that applies most often)

Respondents were asked to indicate the type of paddle craft they most frequently use as well as whether they typically use their own craft or rent craft. Over half of respondents, 58.3%, indicated they most frequently use their own kayak.

Those respondents who selected "other" indicated that they frequently borrow paddle craft from friends and/or family. Respondents also indicated they use both their own canoe and kayak, they use rafts, they rent craft for convenience/while traveling, and they use craft provided by a guide.

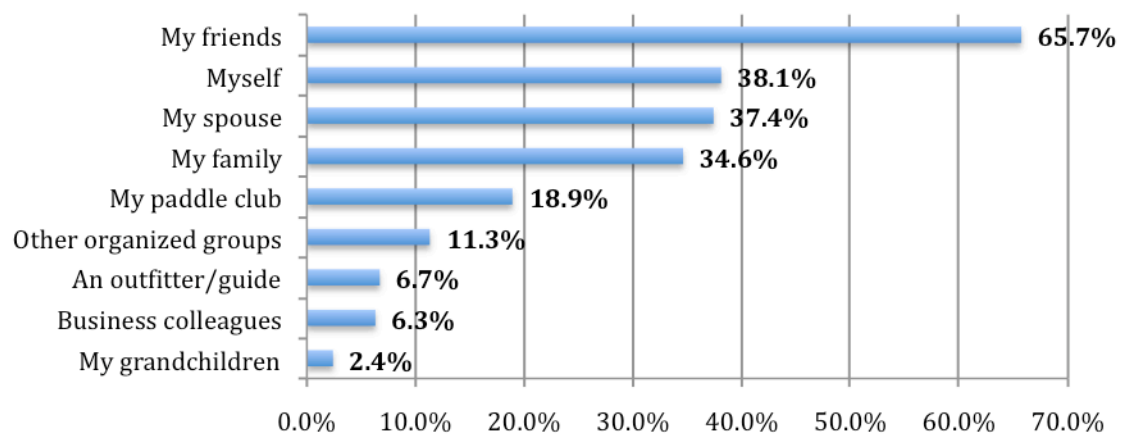
Figure 2
Paddle Craft Used
(n = 2,139)



3.) With whom do you typically paddle? (Check all that apply)

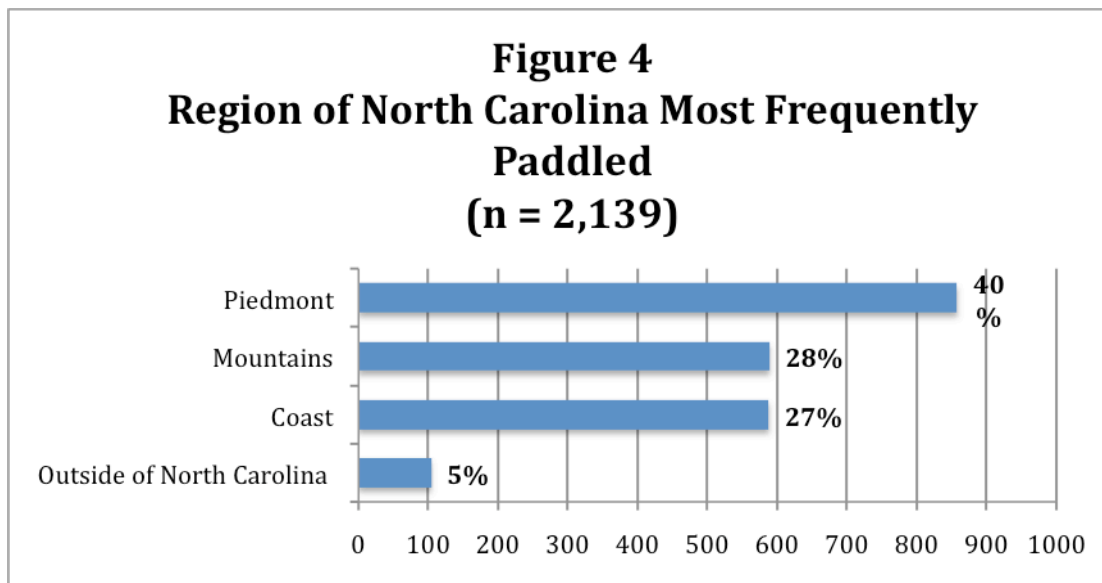
Respondents indicated they typically (66%) paddle with friends. They also indicated they often paddle with their spouse (37%), with their family (35%), and by themselves (38%). Respondents were able to check multiple responses, so percentages do not add up to 100%.

Figure 3
Paddling Party
(n = 2,149)



4.) What region of North Carolina do you most frequently paddle?

Most respondents (40%) indicated they paddle most frequently in the Piedmont region of North Carolina. Over one quarter (28%) of respondents indicated they most frequently paddle in the mountains. The same number of respondents (28%) reported they most frequently paddle at the coast. Results should be interpreted with caution, however; 86% of respondents were from the Piedmont area (please see question six below).



5.) Please list the top three rivers/bodies of water you most frequently paddle.

When asked to report the top three rivers/bodies of water they most frequently paddle, respondents named bodies of water from all over North Carolina and outside of the state. North Carolina rivers made up the majority of frequently paddled bodies of water. However, many respondents indicated they most frequently paddle flat waters such as lakes, ponds, and inlets. Other respondents listed oceans and sounds in their top three. Please note: this question was modified mid-way through the survey process to allow respondents to list other bodies of water in addition to rivers. The original question asked respondents to list the top three *rivers* they most frequently paddle.

Table I. Forty Most Frequently Paddled Bodies of Water (n = 2,044)

Body of Water	Responses	Body of Water	Responses
Neuse River	306	Jordan Lake	66
Cape Fear River	255	White Oak	64
Nantahala River	254	Intracoastal Waterway	64
New River	253	Mayo River	59
Haw River	241	Trent River	57
Dan River	225	Cheoah River	55
French Broad River	216	Nolichucky River	55
Yadkin River	161	Ocoee River	54
Green River	145	Watauga River	53
Big Laurel	114	N.E. Cape Fear River	48
Catawba River	112	Pigeon River	48
Eno River	111	Black River	45
Lumber River	106	Chattooga River	45
Falls Lake/Beaverdam Lake	92	Uwharrie River	44
Tar River	91	Smith River	44
Roanoke River	88	Pamlico River	31
Tuckaseegee River	82	Bogue Sound	23
Jordan Lake	80	Flat River	22
Wilsons Creek	74	Waccamaw River	22
Deep River	69	Newport River	21

Respondent Demographics

Respondents were asked four questions on demographic data. The purpose of this data was to determine the geographic origin of paddlers and to describe paddlers who are using paddle trails and sites.

6.) Please enter your home zip code.

Respondents' home zip codes corresponded with 77 North Carolina counties as well as a number of states across the country. The largest representation from outside North Carolina was from Georgia (55 responses), South Carolina (51), Tennessee (45) and Virginia (37). Other states held less than ten respondents each.

Respondents represented the following 77 North Carolina counties:

Alamance, Alexander, Alleghany, Anson, Avery, Beaufort, Bertie, Bladen, Brunswick, Buncombe, Burke, Cabarrus, Caldwell, Camden, Carteret, Caswell, Catawba, Chatham, Cherokee, Chowan, Clay, Cleveland, Craven, Cumberland, Currituck, Dare, Davidson, Davie,

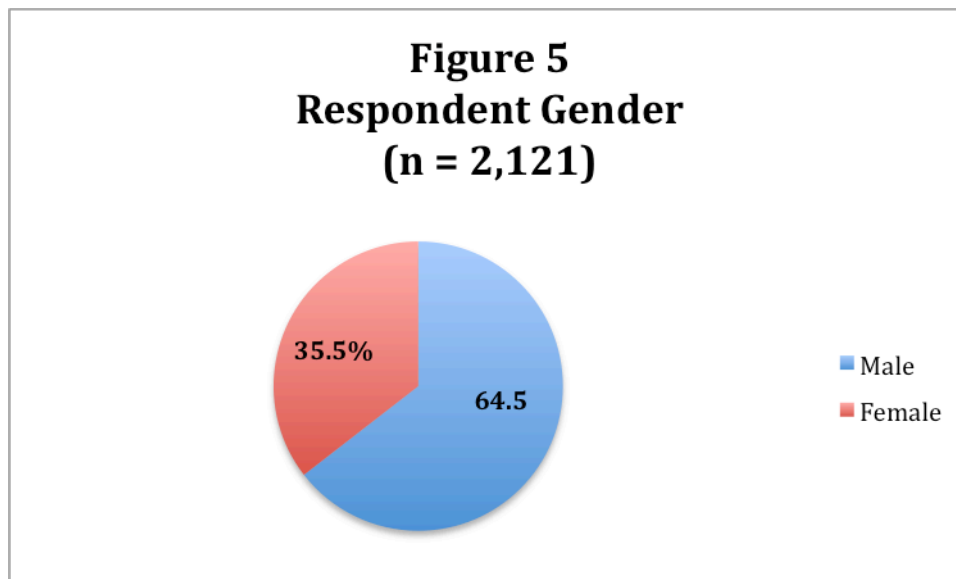
Duplin, Durham, Edgecombe, Forsyth, Franklin, Gaston, Gates, Graham, Granville, Greene, Halifax, Harnett, Haywood, Henderson, Hertford, Hoke, Hyde, Iredell, Jackson, Johnston, Lee, Mecklenburg, Mitchell, Montgomery, Moore, Nash, New Hanover, Onslow, Orange, Pamlico, Person, Pitt, Polk, Randolph, Richmond, Robeson, Rockingham, Rowan, Sampson, Stanly, Stokes, Surry, Transylvania, Wake, Watauga, Wayne, Wilkes.

Table II. North Carolina Respondents (n= 1,816)

Mountains		Piedmont		Coast	
Ashe	21	Alexander	19	Beaufort	47
Alleghany	9	Anson	6	Bertie	4
Avery	8	Alamance	96	Bladen	17
Buncombe	90	Cabarrus	53	Brunswick	55
Burke	10	Caswell	22	Camden	9
Caldwell	2	Catawba	19	Carteret	47
Cherokee	2	Chatham	82	Chowan	13
Clay	2	Cleveland	9	Craven	22
Graham	6	Cumberland	46	Currituck	1
Haywood	16	Davidson	87	Dare	20
Henderson	9	Davie	11	Duplin	8
Jackson	2	Durham	120	Edgecombe	15
Mitchell	1	Forsyth	61	Gates	6
Polk	5	Franklin	19	Greene	15
Transylvania	1	Gaston	31	Halifax	7
Watauga	1	Granville	7	Hertford	2
Wilkes	3	Guilford	82	Hyde	3
		Harnett	4	New Hanover	61
		Hoke	12	Onslow	13
		Iredell	5	Pamlico	11
		Johnston	49	Sampson	14
		Lee	1	Wayne	2
		Mecklenburg	49		
		Montgomery	23		
		Moore	7		
		Nash	9		
		Orange	15		
		Person	2		
		Pitt	22		
		Randolph	3		
		Richmond	1		
		Robeson	3		
		Rockingham	20		
		Rowan	2		
		Stanly	2		
		Stokes	11		
		Surry	10		
		Wake	216		

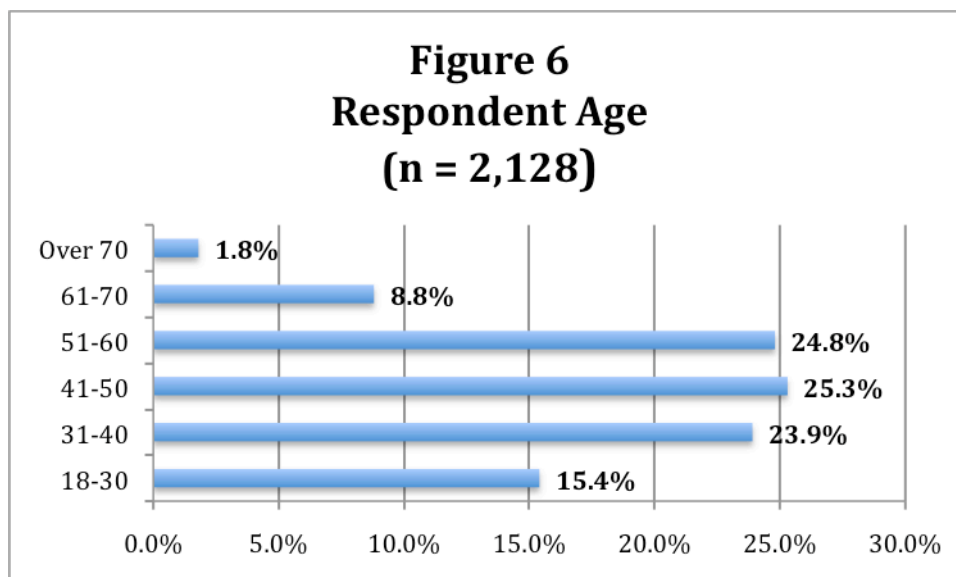
7.) Gender

The majority of survey respondents (64.5%) were male.



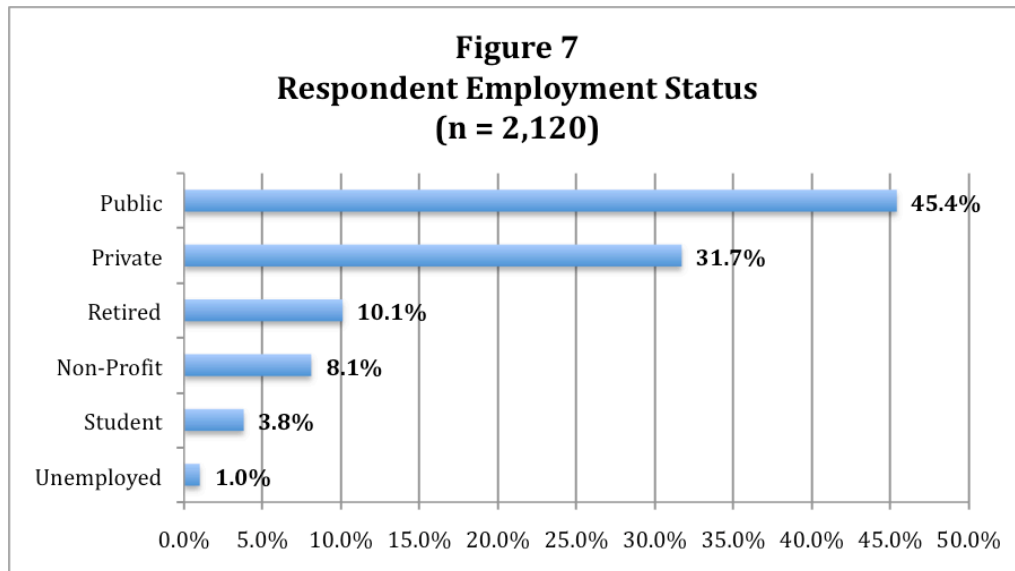
8.) What is your age?

Almost three-quarters of respondents (74%) were between 31 and 60 years old, split fairly evenly across each decade of ages.



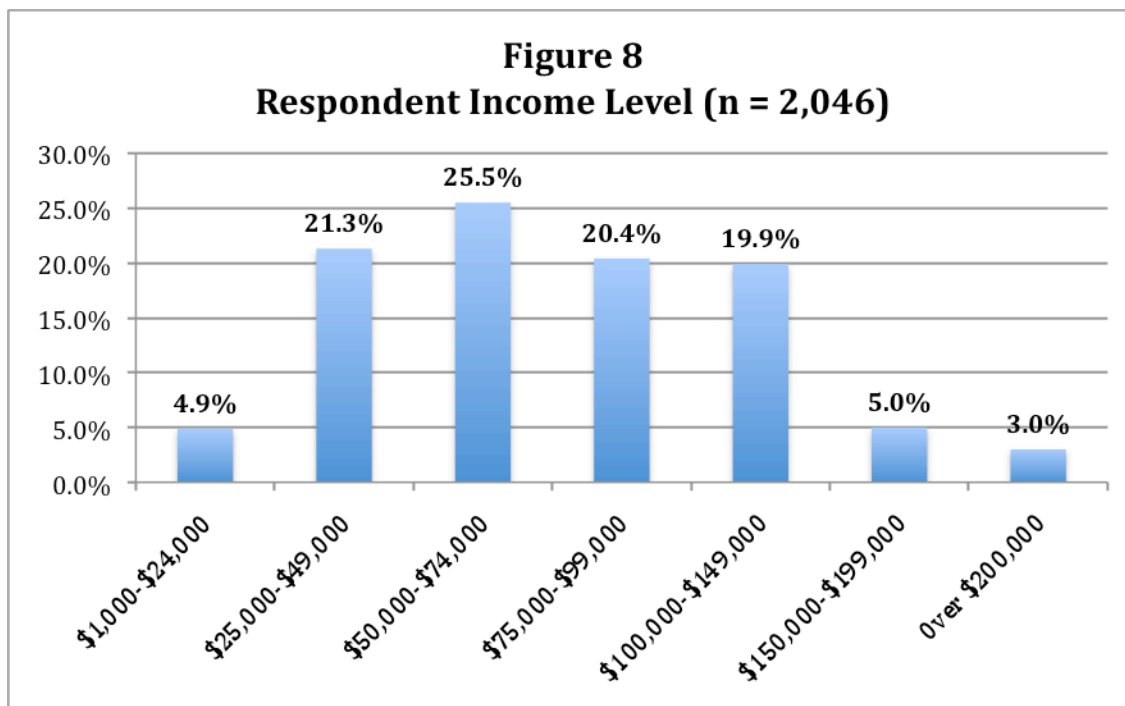
9.) Would you describe your employment status as...

Respondents were asked to indicate their employment status. Almost half of all respondents (45%) reported they work in the public sector. Nearly one-third (32%) indicated they work in the private sector.



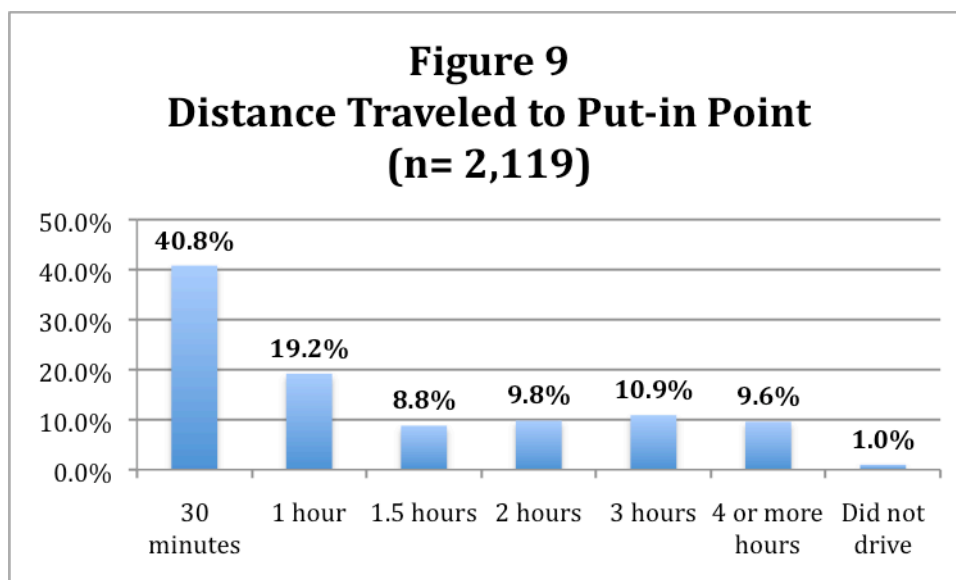
10.) What is your income level?

Over one quarter of respondents (25.5%) reported a household income level of between \$50,000-\$74,000, another 20.4% between \$75,000-\$99,000 and another 28 percent (27.9%) of respondents reported a household income of \$100,000 or more.



11.) On your last paddling trip, how far did you drive from your home to the put in point?

Two-fifths of respondents (41%) indicated they drove 30 minutes or less to begin their paddling trip. Another fifth (19.2%) drove up to one hour, another fifth drove up to two hours (18.6%), and one fifth (20.5%) drove three hours or more.



12a.) Last year, how many paddling trips did you take within 50 miles from your home?

Respondents were asked to indicate the number of paddling trips they took last year within 50 miles of their home. This data was cross-referenced with the respondent's self-categorized paddling level to calculate the average amount of paddling trips taken by paddle level. These averages do not include responses of zero trips taken. Additionally, for the sake of conservative calculations, this average replaces responses of 26 trips or more with the number 26. Twenty-six is the number of trips one might take if a trip is taken every two weeks. This may be undercutting the frequent paddler's impact, however, it makes for a conservative estimate. Those who categorized themselves as avid paddlers took the greatest amount of paddle trips within 50 miles from their homes at an average of 17 trips. Recreational paddlers took an average of eight trips last year and novice paddlers took an average number of four paddling trips last year.

Table III. Paddle Trips Taken Within 50 Miles of Home (n = 1,803)

Self Categorized Paddle Level	Average No. Annual Trips
Avid (n = 522)	17
Recreational (n = 1032)	8
Novice (n = 249)	4

12b.) Last year, how many paddling trips did you take farther than 50 miles from your home?

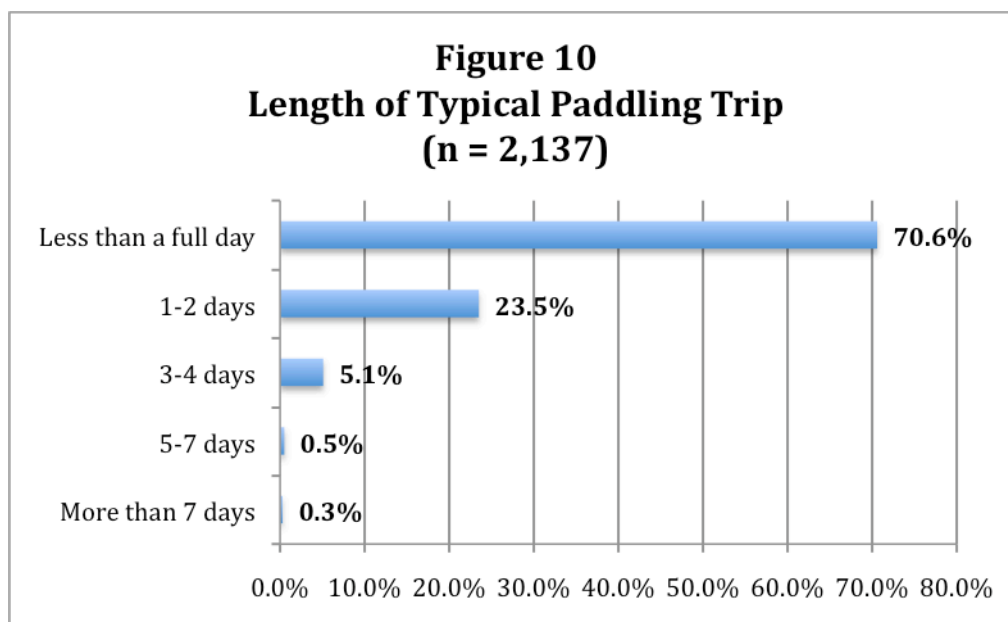
Respondents were also asked to report how many paddling trips they took more than 50 miles from their home, a distance considered to define a “tourist” by the Travel Industry Association of America. This data was cross -referenced with respondents self-categorized paddle level to calculate the average number of trips taken by paddle level. These averages do not include responses of zero trips. Following the rationale described for trips taken within 50 miles of home, this average replaces responses of 26 trips or more with the number 26. Those who considered themselves avid, recreational, and novice paddlers took an average of 9, 6 and 6 paddle trips, respectively.

Table IV. Paddle Trips Taken Farther than 50 Miles from Home (n = 1,714)

Self Categorized Paddle Level	Average No. Annual Trips
Avid (n = 414)	9
Recreational (n = 796)	6
Novice (n = 252)	6

13.) How long is your typical paddling trip including travel time?

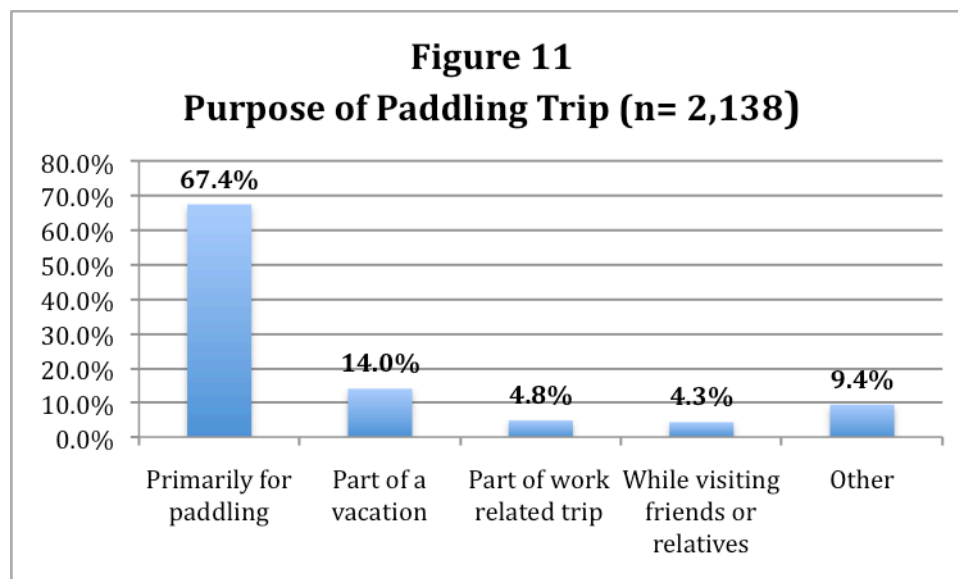
Most respondents (71%) reported spending less than a full day on a typical paddle outing. Another quarter of respondents (24%) indicated spending between one and two days.



14.) My last paddling trip was...

Respondents were asked to indicate the reason for their paddling trip, and not surprisingly, they indicated the majority of their paddling trips (67%) were first and foremost for paddling. Paddling while on vacation was the next most reported context for paddling trips.

Most of those respondents who selected “other” indicated the primary purpose of their paddling trip was for fishing. Scouting trips, river cleanups, exercise, and spending time at second homes were also mentioned.



15.) When on a paddling trip what type of lodging do you most frequently use? Please Rank with 1 being the most frequently used, 2 being the second most frequently used, and so on.

When asked to rank their lodging preferences, camping fell into the top three choices with 70.5% of respondents, primitive camping was among the top three for over half (56.4%) of respondents, and staying with friends and family was in the top three options for nearly half of respondents (47.7%). Nearly one-third of respondents (32.8%) reported hotels and motels in their top three lodging choices. Additionally, over three-fourths of respondents (77.4%) indicated that they prefer no lodging at all - they take day trips only.

Respondents who selected “other” indicated they most frequently stay in rental homes when on paddling trips. Other frequent open-ended responses included staying at second homes and staying in one’s vehicle.

Table V. Lodging Preferences (n = 2,076)

	% Ranked as First Choice	% Ranked as Second Choice	% Ranked as Third Choice	% Total of Top Three Choices
Day Trip	53.9%	11.0%	12.6%	77.4%
Campsite Camping	15.1%	32.3%	23.2%	70.5%
Primitive Camping	13.5%	20.0%	22.9%	56.4%
Hotel/Motel	3.8%	10.9%	18.1%	32.8%
Bed& Breakfast	0.8%	3.4%	5.2%	9.4%
Other	2.4%	1.9%	1.4%	5.7%

16.) When on a paddling trip what are your concerns?

Respondents were asked to report their concerns while on a paddling trip. Almost three-fourths of respondents reported often having a concern about the quality and safety of access sites (73%) and adequate water level (72%). And over half stated that they are often concerned about the safety of their personal vehicle. Respondents indicated a low level of concern with quality of rental equipment, and being recognized as an outsider.

Table VI. Concerns When on a Paddling Trip (n = 2,130)

	Often Concerned	Sometimes Concerned	Never Concerned
Quality and safety of access sites	72.6%	24.5%	3.0%
Adequate water level	71.1%	26.0%	2.9%
Safety of my personal vehicle	52.6%	38.4%	8.9%
Distance between access sites	42.2%	47.7%	10.1%
Difficult portages	38.8%	46.0%	15.2%
Personal safety in the community	36.8%	41.7%	21.5%
Ability to call for assistance	22.7%	49.6%	27.7%
Availability of restrooms	19.5%	43.6%	36.9%
Finding a safe, clean, comfortable lodging	19.5%	49.5%	31.0%
Access to medical care	18.4%	50.4%	31.2%
Quality of rental equipment	13.3%	26.7%	60.0%
Access to knowledgeable instructors/guides	11.6%	39.9%	48.4%
Getting lost	8.6%	40.8%	50.7%
Being recognized as an outsider	5.8%	36.0%	58.2%

17.) When on a paddling trip I...

Respondents were asked about the type of experience they enjoy while on a paddling trip. They indicated they most enjoy seeing wildlife, seeing birds, being away from the city, and learning about native flora. Over one third of respondents (38%, 37%, 36% and 33%, respectively) reported that they often enjoy learning about local history, getting the feel of local culture, experiencing local cafes and trying regional foods while on a paddling trip.

Table VII. Enjoyable Elements of Paddling Trips (n = 2,135)

	Often Enjoy	Sometimes Enjoy	Never Enjoy
Want to see wildlife	91.5%	8.2%	0.4%
Like Being away from the city	87.3%	12.3%	0.4%
Want to see birds	82.3%	16.2%	1.5%
Typically pack my own food	61.7%	35.5%	2.8%
Enjoy learning about native flora	60.5%	34.6%	5.0%
Learn about local history	38.3%	55.1%	6.6%
Get the feel of local culture	37.2%	54.7%	8.2%
Experience local cafes and restaurants	36.3%	54.1%	9.6%
Try regional foods	33.7%	54.8%	11.5%
Enjoy hearing local music	29.6%	55.1%	15.3%
Stay at local campgrounds	28.9%	47.8%	23.3%
Look for handmade arts and crafts to buy	19.2%	46.7%	34.2%
Go fishing	18.8%	33.7%	47.4%
Meet the locals	18.5%	67.0%	14.5%
Visit farmers markets	15.6%	52.4%	32.1%
Attend community events	11.4%	57.9%	30.7%
Visit farms	6.4%	36.3%	57.2%
Stay at B&Bs and/or locally owned lodging	5.0%	34.8%	60.2%
Seek out well known chain lodging	2.9%	35.9%	61.2%
Seek out well-known chain restaurants	2.2%	38.4%	59.5%

18.) Which of the following sources do you use to plan paddling trips? Please rank with 1 being the most frequently used source.

When asked to rank sources used to plan paddling trips, over three-fourths of respondents (77.1%) indicated they rely on word of mouth and the Internet (68.5%) as a top planning sources. Other top sources include books (43.1%), and maps/gazetteers (42.3%). Almost one-third of respondents (31.2%) reported using paddle club newsletters as one of their top planning sources.

Respondents who selected “other” indicated they most frequently refer to friends to plan their paddle trips, use their personal knowledge/experience and use information from brochures.

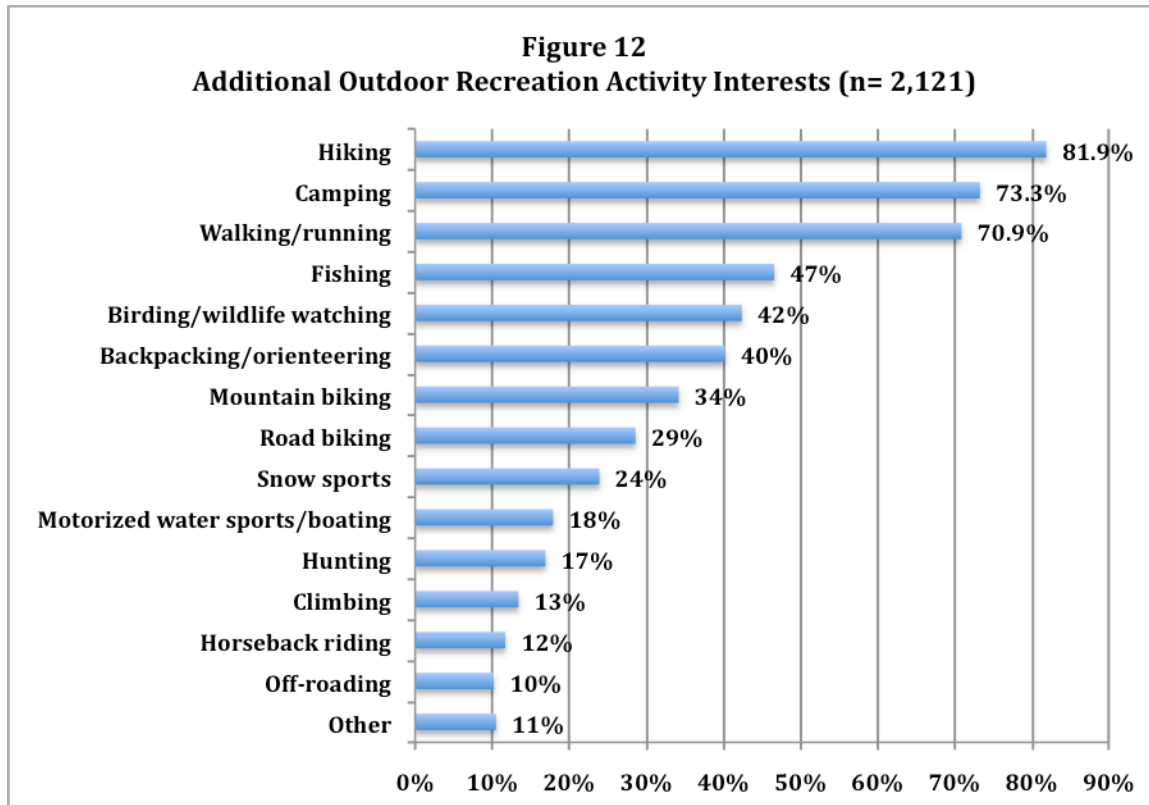
Table VIII. Sources Used to Plan Paddling Trip (n= 2,101)

	Source One	Source Two	Source Three	% Total of Top Three
Word of Mouth	34.4%	29.3%	13.4%	77.1%
Internet	35.7%	20.8%	11.9%	68.5%
Books	6.6%	15.7%	20.8%	43.1%
Maps/Gazetteers	9.1%	14.1%	19.1%	42.3%
Club Newsletters	8.3%	10.1%	12.8%	31.2%
Magazines	0.9%	4.1%	10.4%	15.4%
Outfitter Newsletters	1.6%	4.0%	7.0%	12.6%
Television	0.6%	0.9%	4.0%	5.5%

19.) In addition to paddling, I also participate in the following outdoor recreation activities...(Check all that apply)

Respondents were asked to indicate what other outdoor recreation activities they participate in. Popular outdoor recreation activities among respondents were hiking (82%), camping (73%) and walking/running (71%).

Respondents who selected “other” most frequently indicated that they participate in sailing, swimming, and motorcycling. Scuba diving, surfing and nature photography were also reported as additional outdoor recreation activity interests among respondents.



20.) Please check the appropriate boxes below to estimate how much money your party spent on your last paddling trip WITHIN your local area (50 mile radius).

While considering their last local paddling trip, respondents were asked to indicate their level of spending in several spending categories. The highest spending categories were transportation, food and gear. Total spending on paddling within respondents' local area was over \$270,000, for an average \$144 per trip.

Table IX. Level of Spending within Local Area (n = 2,055)

	Total by Category	Total per Party
Transportation	\$74,625	\$38
Food	\$63,300	\$32.13
Gear	\$48,650	\$26.73
Guide Fees	\$24,075	\$13.06
Shopping	\$21,075	\$11.46
Entertainment	\$19,350	\$10.60
Lodging	\$15,225	\$8.04
Other	\$3,775	\$3.89
Total Yearly Spending	\$270,075	\$143.60

As an additional examination, we have cross-referenced respondents' spending with their self-categorized paddler level. In the survey, respondents were given monetary ranges to select for each category. The figures listed in the tables below were calculated by using the bottom number for each category range. For example if a respondent noted that they spent between \$51 and \$100 on food on their last paddle trip within their local area, the figure of \$51 was used in the averaging process.

Recreational, Novice, and Avid paddlers all spent the most money on transportation, and food. Purchasing paddling gear represented the highest average spending category.

Recreational, Novice and Avid paddlers spent an average of \$81, \$54, and \$70 respectively on purchasing paddling gear for trips taken within their local area.

Those who responded to the open-ended response option of this question indicated they also pay for beer, parking, park entrance fees, and fishing bait/tackle on paddling trips within their local areas.

Table X. Recreational Paddler Spending Estimates by Category
Local Trips
(n = 1,202)

	Transportation	Lodging	Guided trip fees/rental equipment	Purchased paddling gear	Food	Activities	Shopping	Other
Number of Responses	1,081	192	255	315	869	260	237	50
Total Spending	\$31,532	\$6,550	\$10,594	\$25,416	\$28,095	\$8,138	\$8,503	\$1,465
Average Spending	\$29	\$34	\$42	\$81	\$32	\$31	\$36	\$29

Table XI. Novice Paddler Spending Estimates by Category
Local Trips
(n= 368)

	Transportation	Lodging	Guided trip fees/rental equipment	Purchased paddling gear	Food	Activities	Shopping	Other
Number of Responses	285	75	127	91	228	95	92	21
Total Spending	\$7,691	\$2,378	\$5,498	\$4,938	\$6,513	\$2,643	\$3,152	\$500
Average Spending	\$27	\$32	\$43	\$54	\$29	\$28	\$34	\$24

Table XII. Avid Paddler Spending Estimates by Category
Local Trips
(n=576)

	Transportation	Lodging	Guided trip fees/rental equipment	Purchased paddling gear	Food	Activities	Shopping	Other
Number of Responses	543	96	82	146	431	118	115	26
Total Spending	\$18,781	\$3,175	\$2,748	\$10,175	\$14,564	\$4,134	\$3,868	\$1,062
Average Spending	\$35	\$33	\$34	\$70	\$34	\$35	\$34	\$41

21.) Please check the appropriate boxes below to estimate how much money your party spent on your last paddling trip OUTSIDE your local area (50 mile radius).

While considering the last paddling trip taken outside their local area, respondents were asked to indicate their level of spending in several spending categories. Transportation, lodging, food, and gear made up the top spending categories. Total spending on paddling outside respondents' local area equaled almost \$950,000, an average of \$504 per trip.

Table XIII. Level of Spending Outside Local Area (n=2,022)

	Total by Category	Total per Party
Transportation	\$220,875	\$112
Food	\$185,875	\$94.35
Lodging	\$165,225	\$87.28
Gear	\$92,625	\$50.89
Guide Fees	\$76,000	\$41.21
Shopping	\$71,400	\$38.83
Entertainment	\$69,900	\$38.28
Airfare	\$56,425	\$31.45
Other	\$9,475	\$9.77
Total Yearly Spending	\$947,800	\$503.62

As an additional examination, we have cross-referenced respondents' spending with their self-categorized paddler level. In the survey, respondents were given monetary ranges to select for each category. The figures listed in the tables below were calculated by using the bottom number for each category range. For example if a respondent noted that they spent between \$51 and \$100 on food on their last paddle trip within their local area, the figure of \$51 was used in the averaging process.

All three paddler levels, recreational, novice and avid, spent the most money on lodging, activities, and guided trips fees/rental equipment, respectively. Transportation represented the highest average spending category. Recreational, Novice and Avid paddlers spent an average of \$168, \$130, and \$212, respectively, on transportation to paddling trips taken outside their local area.

Those who responded to the open-ended response option of this question indicated they often pay for fishing bait/tackle, local arts and crafts, camping fees, and beer on paddling trips outside their local area.

**Table XIV. Recreational Paddler Spending Estimates by Category
Trips Outside Local Area
(n= 1,202)**

	Transportation	Lodging	Guided trip fees/rental equipment	Purchased paddling gear	Food	Activities	Shopping	Other
Number of Responses	142	958	623	387	366	923	476	500
Total Spending	\$23,820	\$85,742	\$76,682	\$36,865	\$34,661	\$77,538	\$30,032	\$31,979
Average Spending	\$168	\$90	\$123	\$95	\$95	\$84	\$63	\$64

**Table XV. Novice Paddler Spending Estimates by Category
Trips Outside Local Area
(n=368)**

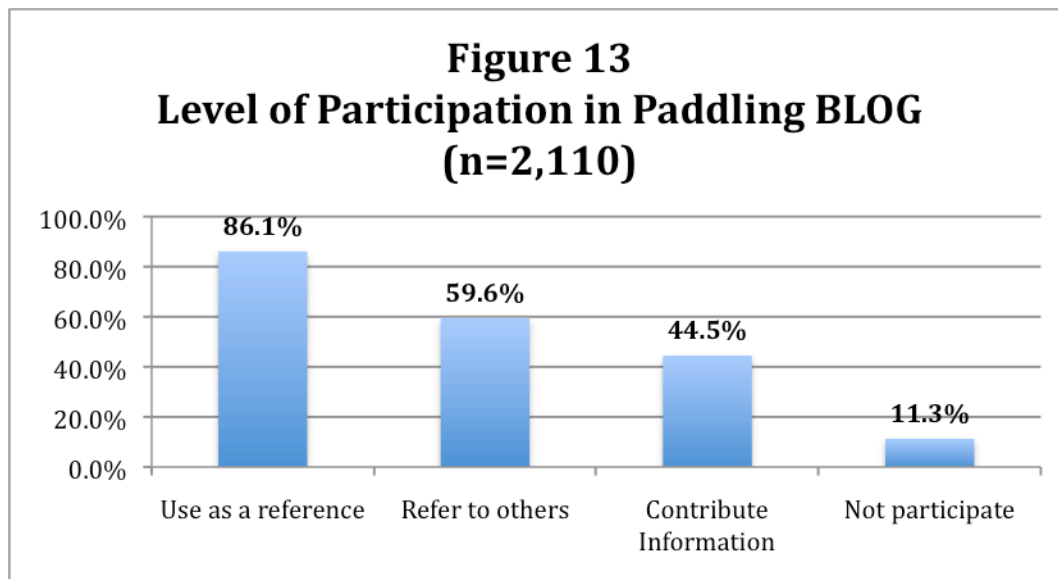
	Transportation	Lodging	Guided trip fees/rental equipment	Purchased paddling gear	Food	Activities	Shopping	Other
Number of Responses	39	241	154	151	89	235	134	135
Total Spending	\$5,081	\$18,905	\$16,859	\$11,780	\$7,598	\$17,591	\$7,364	\$8,467
Average Spending	\$130	\$78	\$109	\$78	\$85	\$75	\$55	\$63

**Table XVI. Avid Paddler Spending Estimates by Category
Trips Outside Local Area
(n=576)**

	Transportation	Lodging	Guided trip fees/rental equipment	Purchased paddling gear	Food	Activities	Shopping	Other
Number of Responses	98	540	398	154	299	535	279	284
Total Spending	\$20,741	\$73,917	\$45,054	\$14,033	\$34,943	\$54,491	\$18,198	\$17,603
Average Spending	\$212	\$137	\$113	\$91	\$117	\$102	\$65	\$62

22.) If a web based log (BLOG) was available for monitoring paddling conditions for an area in which you paddle, would you... (Check all that apply)

Respondents were asked to indicate their level of participation with a proposed BLOG that would monitor paddling conditions in various paddling areas. The majority of respondents (86%) said they would use a BLOG as a reference. Over half (57%) indicated they would refer it to others, and just under half of all respondents (45%) indicated they would contribute information to it.

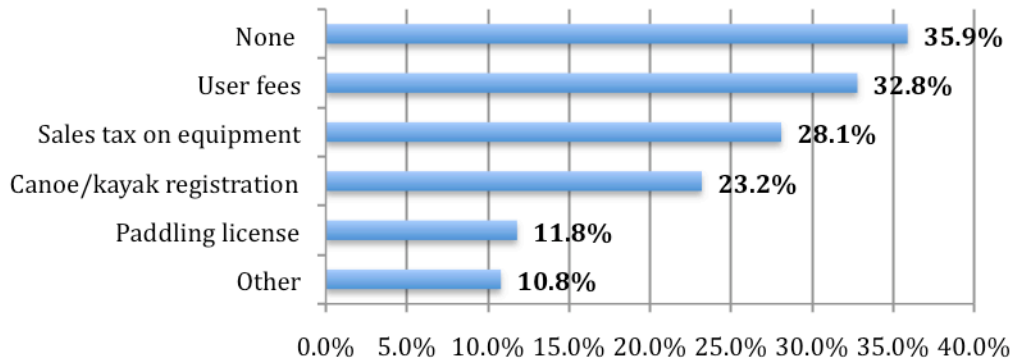


23.) Which of the following would you support as a means for funding improved and increased paddle access? (check all that apply)

Almost two-thirds of respondents (64%) support additional funding for paddle access and trail development. One-third (36%) reported they would not support any of the listed funding sources for improved and increased paddle access and trail development. Out of the four choices, the most supported (33%), was user fees.

Those who answered “other” had the opportunity to suggest additional funding options. Respondents offered a wide range of suggestions. The suggestions for funding that surfaced most often were donations, contributions from existing state, local, and federal funding sources, and contributions from existing taxes like gas and hospitality/occupancy. Additional suggestions included creating a guide service tax, supporting organizations that promote access like local clubs and American Whitewater, and promoting volunteerism. Many respondents reiterated their support for user fees like parking, launch and entrance fees.

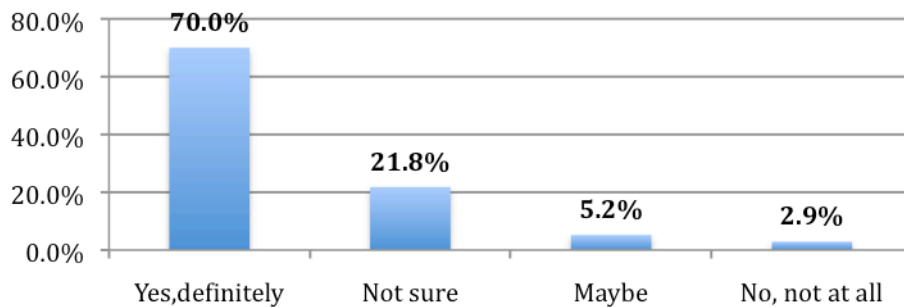
Figure 14
Level of Support for Funding Sources
(n=2093)



24.) Do you feel that paddle trail development is a viable form of economic development for North Carolina?

Over two-thirds of respondents (70%) feel that paddle trail development is a viable form of economic development for North Carolina. Another fifth (21.8%) were unsure. Those who responded “maybe” felt that it depended on the location and who was involved in the development. Others felt it is possible for paddle tourism to contribute to economic development if more paddle trails were developed, promoted and maintained.

Figure 15
View of Paddle Tourism as a Form of
Economic Development
(n = 2,119)



25.) What can we do to improve a visitor's paddling experience in North Carolina? (n=1,225)

This open-ended survey question gave respondents the opportunity to make comments and suggestions related to improving paddling experiences in North Carolina.

The most frequent topic that emerged, cited by nearly 450 respondents, was related to improving and increasing the number of paddle trails and access areas for existing paddle trails. A number of respondents indicated the need for more paddle access and parking at DOT bridges and right-of-ways. Suggestions for paddle access improvements included restroom facilities, signage, and camping opportunities. Respondents also voiced concern for the safety of their personal vehicles and the availability of emergency call stations. Many felt that more campsites including platforms for camping along paddle trails would improve their experience. They also suggested increasing dam releases, increasing areas that prohibit motorized boating, and promoting river clean-ups.

Two hundred fifty respondents commented on the need for more planning resources for paddling trips. Examples of resources listed by respondents included maps, guides, and references such as websites and brochures. Respondents also indicated the type of information that would be helpful in planning paddling trips, including more detailed paddle trail information that point out hazards/portages, lists of shuttles, lodging and facilities, camping opportunities, and information for new paddlers. Many respondents suggested a comprehensive, state operated website where paddle trail maps and information can be downloaded and printed.

Communication and collaboration ideas were noted by roughly 200 respondents. These individuals offered a number of suggestions on how to work together with various organizations to improve paddle experiences in North Carolina. Many respondents felt it would be beneficial to create a well-developed central website where all types of agencies involved in paddling can disseminate information about where to paddle, conditions, events, and news. Several respondents indicated the need for better advertising, promotion, and public relations for paddling. They suggested television coverage of paddle events, listings in newspaper's to-do sections, and stories in travel magazines.

Approximately 80 respondents commented on issues related to natural resources. The majority of these respondents voiced concern for the need to control erosion, restrict development, stop deforestation, and to reduce impact in general. Other respondents expressed support for riparian buffer programs and suggested the purchase of lands for linear recreation corridors.

The topics of volunteerism and pollution control were noted by roughly 65 respondents. Comments and suggestions included initiating and promoting more river cleanups, and creating funding for local outfitters/clubs to organize more effective cleanups within their communities.

Remaining comments included those related to education and tourism. Respondents noted the need for more water safety courses, courses on environmental stewardship, paddling programs for families, and guide certification courses. Tourism suggestions included promoting ecotourism, creating packages that may include paddling with lodging and dining, and better marketing of paddle tourism.

26.) Thank you for taking the N.C. Paddle Trails information survey! If you have any questions, suggestions, or concerns that were not addressed in this survey, please list them below. (n=190)

The majority of respondents who chose to leave a response to this question used it as an opportunity to offer their thanks for conducting the survey. Other respondents used this response option to reiterate their stance against paddling fees, licenses, and registrations. Several comments suggested a comprehensive, state run informational website, some urged addressing conflicts with multi-use boat ramps, and others voiced concerns with littering and water quality.

Implications

The results from this study have provided the State Trails Program with important information that will be used to enhance paddling experiences and promote travel related to paddling in North Carolina. This concluding section is designed to highlight and discuss the key findings and to draw implications from those findings. Based on the study the following conclusions can be made:

Characteristics of Paddlers

The study revealed a wide range of information about paddlers from demographics to level of paddling experience. It is important to have a broad understanding of paddler characteristics to aid in planning, marketing and decision-making.

- ❖ Three-quarters of respondents were between 31-60.
- ❖ The majority (28%) of respondents reported an income level of 100k or more.

Implication: The age range and income level of respondents suggests that significant portions of the paddling population are working professionals with discretionary income. Local economies can benefit from these characteristics of paddlers by promoting other activities alongside paddling for visitors to spend money on. These activities might include local festivals and events, shopping for local handmade arts and crafts, and/or natural and cultural heritage experiences.

- ❖ Over half (56%) of respondents consider themselves recreational paddlers.
- ❖ The overwhelming majority of respondents (66%) most frequently paddle with friends.

Implication: Recreational paddlers have likely adopted paddling as a hobby and enjoy participating in it for fun, relaxation, exercise, and spending leisure time with friends. Understanding that the majority of North Carolina's paddlers are going out in groups for recreational purposes is vital to the development of legal and safe paddle access areas and trails. This information can also be used by the NC State Trails Program as well as local outfitters and non-profit paddle organizations to expand and promote paddling activities throughout the state.

- ❖ Most respondents (58%) use their own kayak when paddling compared to (20%) that use their own canoe.
- ❖ When taking a paddle trip, only 8% and 7% of respondents rent a canoe or kayak respectively.

Implication: People are spending money to purchase paddle craft, predominantly kayaks, and prefer owning to renting. This information is particularly useful to North

Carolina's paddle outfitters to see that, as paddling gains popularity people make the decision to purchase expensive paddle craft. It is also important to the NC State Trails Program and NC State Parks to understand trends in paddling so that they may be able to better serve the paddling population by planning access areas that cater to kayakers, expanding paddle craft rentals to include more kayaks, and to create kayaking programs and opportunities.

- ❖ Respondents indicated they take paddling trips primarily for paddling.
- ❖ Respondents like being away from the city and want to see birds and wildlife on paddling trips.
- ❖ Most respondents also enjoy hiking and camping.
- ❖ Respondents indicated they most often take paddling day trips and do not stay over night when on a paddling trip.
- ❖ When taking an overnight paddle trip, most respondents chose camping as their top lodging option.

Implication: The State Trails Program should make an effort to acquire additional land for the creation of land trails and camping areas when considering the development of paddle trails. Local governments, municipalities, non-profits/friends of organizations, paddle clubs and paddle outfitters should create opportunities for paddlers taking day trips to experience local flora and fauna. These opportunities can be promoted through a comprehensive, state run website, websites run by local organizations, and/or through printed trail maps.

- ❖ Word of mouth is the most counted on source of information when planning a paddling trip, followed by the Internet.
- ❖ Over two hundred fifty respondents commented on the need for more planning resources for paddling trips. Many respondents suggested a comprehensive, state operated website where paddle trail maps and information can be downloaded and/or printed.

Implication: The State Trails Program could implement a paddle trail website that provides information on legal and safe paddle access areas and paddle trails that comply with state paddle access and trail standards. This website could also include links to various paddle clubs and outfitters across the state where these organizations can showcase the variety of lodging and trip activities their local areas offer.

Economic Impact

- ❖ The 2008 Paddle Tourism Study has estimated that last year, paddlers in North Carolina spent \$270,075 on local paddling trips and \$947,800 on non-local trips.
- ❖ Paddlers spent an average of \$144 per party on their last local trip and an average of \$503 dollars per party on their last non-local trip.

Implication: This economic data suggests that paddler recreation and tourism have an impact on local economies as well as the state economy. Paddling's impact on the North Carolina economy is only beginning to be understood. Additional research should be conducted to ascertain the impact of outfitters to gain information that would provide hard evidence of their contribution to the local and state economies.

- ❖ Most respondents felt that paddle trail development is a viable form of economic development.

Implication: Increasing opportunities for camping and lodging, special events, dining, and further developing paddle trails can expand paddler spending in local communities. North Carolina communities have a wealth of cultural resources to offer visitors. Examples of these resources include local hand made crafts, music, festivals, and entertainment. Paddling and paddle trails should be connected to local communities so that visitors can explore and enjoy the many other assets available.

- ❖ Paddle clubs play an important part in educating, promoting and keeping the paddle trails safe. These clubs frequently have websites promoting paddling activities, events, and when and where to paddle.

Implication: It would be beneficial for the State Trails Program to collaborate with paddle clubs statewide to disseminate information, and to promote paddling.

Funding improved and increased paddle access

- ❖ Respondents are most concerned with adequate water level, as well as quality and safety of access areas on paddling trips.
- ❖ Almost two-thirds of respondents (64%) support additional funding for paddle access and trail development. One-third (36%) reported they would not support any of the listed funding sources for improved and increased paddle access and trail development. Out of the four choices, the most supported (33%), was user fees.

Implication: The State Trails Program should consider the willingness of many paddlers to support the development and management of paddle access areas and trails. This additional funding could be made available to governmental agencies and non-

profit organizations that are willing to partner in this effort to plan, build and manage legal and safe paddle access areas and trails.

- ❖ The three most popular bodies of water to paddle, the Neuse River, the Cape Fear River, and the Nantahala River represented each of North Carolina's three regions, the Piedmont, Coast and Mountains. This study indicates that paddling is popular in rivers, streams and lakes across North Carolina. Paddlers enjoy the span of opportunities from paddling white water in western and piedmont streams and rivers to a relaxing paddle on the flat inlets and estuaries in eastern NC.

Implication: Paddle access and trail standards should be created and implemented to guide the planning, development and management of paddle access areas and trails encompassing all of North Carolina's diverse geographical regions.

Priorities of the State Trails Program should include:

- **Working with governmental agencies and non-profit organizations throughout North Carolina to encourage and assist with paddle trail planning, development and management.**
- **Instituting standards for paddle trail access areas and paddle trails that can be implemented by governmental agencies, non-profit organizations that are planning or managing paddle trails – to accommodate the needs of these paddlers.**
- **Considering the willingness of many paddlers to support the development and management of paddle access areas and trails. This additional funding could be made available to governmental agencies and non-profit organizations that are willing to partner in this effort to plan, build and manage legal and safe paddle access areas and trails.**

Future marketing initiatives should include:

- **Implementing a paddle trail website that provides information on legal and safe paddle access areas and paddle trails.**
- **Encouraging and promoting the positive environmental, social and economic values of paddle trails to governmental agencies and non-profit organizations.**

Appendix A - Copy of Questionnaire

1. 2008 N.C. Paddle Tourism Survey

Welcome to the 2008 N.C. Paddle Trails Survey!

Thank you for your willingness to participate in this survey. This survey is being conducted by the North Carolina State Trails Program as a follow up to the 2006 paddle trail development survey. The information obtained from these questions will be used to gain a local and statewide understanding of travel related to paddling, the characteristics of paddlers, and to determine the economic impacts paddlers may have on various areas of North Carolina.

All Completed Surveys Will be Entered Into a Drawing for One of Two Prizes:

1. A \$200 gift card to Great Outdoor Provision Co.
2. \$200 in products or services from your choice of one of the the following partnering outfitters:

- Barrier Island Kayaks
- Endless River Adventures
- Fish Stalkers Outfitters
- Frog Hollow Outdoors
- GetOutdoors
- God's Country Outfitters
- Hanging Rock Outdoor Center
- Haw River Canoe and Kayak Co.
- Headwaters Outfitters
- Herring's Outdoor Sports
- High Mountain Expeditions
- Huck Finn River Adventures
- Paddle Pamlico Kayak Outfitters
- Riverside Canoe and Tube
- Southern Waterways
- The Adventure Company
- Troublesome Creek/Three Rivers Outfitters
- Uwharrie Tours
- White Oak River Outfitters
- Zalloo's Canoes

Please forward this survey to anyone who has an interest in North Carolina paddling as it is important that we hear from as many voices as possible. The information gathered in this survey is critical to the development of positive paddling and travel experiences throughout the state.

The responses to the demographic data are anonymous and will only be used to:

- Determine the geographic area where people are paddling
- Describe paddlers who are using each site
- Emphasize the importance of paddling to potential funders
- Direct future projects to the areas where paddlers are concentrated

At the conclusion of this study, the results will be shared in a comprehensive report available on the North Carolina State Trails Program website. This report will be used to determine what trip qualities are desired by paddlers, and to measure paddlers' economic impacts on North Carolina's local communities. In order to obtain the most accurate information possible, you will be able to fill out the survey only once.

Please encourage as many people as possible to fill out the survey. This will demonstrate strong support for paddling as an increasingly popular recreational activity as well as a source of income for local communities through tourism. The information will also help communities create high-quality paddling experiences.

Thank you for your continued efforts in making North Carolina a better place to paddle.

1. Would you describe yourself as a(n)

- ☐ Avid paddler
- ☐ Recreational paddler
- ☐ Novice paddler

2. When you go paddling do you...(Check the response that applies most often)

- ☐ Use your own canoe
- ☐ Use your own kayak
- ☐ Rent a canoe
- ☐ Rent a kayak
- ☐ Other

Other (please specify)

3. With whom do you typically paddle? (Check all that apply)

- ☐ Myself
- ☐ My friends
- ☐ My spouse
- ☐ My family
- ☐ My grandchildren
- ☐ Business colleagues
- ☐ An outfitter/guide
- ☐ My paddle club
- ☐ Other organized groups (scouts, church, YMCA, tour group, etc.)

4. What region of North Carolina do you most frequently paddle?

- ☐ I paddle primarily outside of North Carolina.
- ☐ Coast
- ☐ Mountains
- ☐ Piedmont

5. Please list the top three rivers/ bodies of water you most frequently paddle.

1.
2.
3.

6. Please enter your home zip code.

7. Gender:

- ☐ Male
- ☐ Female

8. What is your age?

- ☐ 18 - 30
- ☐ 31 - 40
- ☐ 41 - 50
- ☐ 51 - 60
- ☐ 61 - 70
- ☐ Over 70

9. Would you describe your employment status as...

- ☐ Non-profit
- ☐ Private
- ☐ Public
- ☐ Retired
- ☐ Student
- ☐ Unemployed

10. What is your household income level?

- ☐ \$1,000 - \$24,000
- ☐ \$25,000 - \$49,000
- ☐ \$50,000 - \$74,000
- ☐ \$75,000 - \$99,000
- ☐ \$100,000- \$149,000
- ☐ \$150,000 - \$199,000
- ☐ Over \$200,000

11. On your last paddling trip, how far did you drive from your home to the put-in point?

- ☐ 30 minutes
- ☐ 1 hour
- ☐ 1 1/2 hours
- ☐ 2 hours
- ☐ 3 hours
- ☐ 4 or more hours
- ☐ I didn't drive; it was part of a trip in which I flew.

12. Last year, how many paddling trips did you take?

Within 50 miles from your home

Farther than 50 miles from your home

13. How long is your typical paddling trip including travel time?

- ☐ Less than a full day
- ☐ 1-2 days
- ☐ 3-4 Days
- ☐ 5-7 Days
- ☐ More than 7 days

14. My last paddling trip was...

- ☐ Primarily for paddling
- ☐ Part of a vacation
- ☐ Part of a work related trip
- ☐ While I was visiting friends or relatives
- ☐ Other (please specify)

15. Which of the following lodging do you use when on a paddling trip? Please rank with 1 being the most frequently used.

With friends/family	<input type="text"/>	<input type="button" value="▼"/>
At a primitive camp site	<input type="text"/>	<input type="button" value="▼"/>
At a campground	<input type="text"/>	<input type="button" value="▼"/>
At a Bed and Breakfast	<input type="text"/>	<input type="button" value="▼"/>
At a hotel/motel	<input type="text"/>	<input type="button" value="▼"/>
I typically take day trips only.	<input type="text"/>	<input type="button" value="▼"/>
Other	<input type="text"/>	<input type="button" value="▼"/>
(please specify)		
<input type="text"/>		

16. When I take a paddling trip I...

	Often	Sometimes	Never
Like being away from the city	<input type="text"/>	<input type="text"/>	<input type="text"/>
Want to see wildlife	<input type="text"/>	<input type="text"/>	<input type="text"/>
Want to see birds	<input type="text"/>	<input type="text"/>	<input type="text"/>
Enjoy learning about native flora	<input type="text"/>	<input type="text"/>	<input type="text"/>
Go fishing	<input type="text"/>	<input type="text"/>	<input type="text"/>
Meet the locals	<input type="text"/>	<input type="text"/>	<input type="text"/>
Typically pack my own food	<input type="text"/>	<input type="text"/>	<input type="text"/>
Seek out well-known chain restaurants	<input type="text"/>	<input type="text"/>	<input type="text"/>
Experience local cafes and restaurants	<input type="text"/>	<input type="text"/>	<input type="text"/>
Try regional foods	<input type="text"/>	<input type="text"/>	<input type="text"/>
Stay at local campgrounds	<input type="text"/>	<input type="text"/>	<input type="text"/>
Stay at Bed and Breakfasts and/or locally owned lodging	<input type="text"/>	<input type="text"/>	<input type="text"/>
Seek out well-known chain lodging	<input type="text"/>	<input type="text"/>	<input type="text"/>
Learn about local history	<input type="text"/>	<input type="text"/>	<input type="text"/>
Get the feel of local culture	<input type="text"/>	<input type="text"/>	<input type="text"/>
Look for handmade arts and crafts to buy	<input type="text"/>	<input type="text"/>	<input type="text"/>
Attend community events	<input type="text"/>	<input type="text"/>	<input type="text"/>
Enjoy hearing local music	<input type="text"/>	<input type="text"/>	<input type="text"/>
Visit farms	<input type="text"/>	<input type="text"/>	<input type="text"/>
Visit farmer's markets	<input type="text"/>	<input type="text"/>	<input type="text"/>

17. When on a paddling trip what are your concerns?

	Often	Sometimes	Never
Adequate water level	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality and safety of access sites	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Difficult portages	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Distance between access sites	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of restrooms	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Personal safety in the community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to call for assistance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to medical care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of rental equipment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to knowledgeable instructors/guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Finding a safe, clean, and comfortable place to stay	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Safety of my personal vehicle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Being recognized as an outsider	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Getting lost	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

18. Which of the following sources do you use to plan paddling trips? Please rank with 1 being the most frequently used source.

Internet	<input type="text"/>	<input type="button" value="▼"/>
Word of mouth/ recommendation from others	<input type="text"/>	<input type="button" value="▼"/>
Magazines	<input type="text"/>	<input type="button" value="▼"/>
Television	<input type="text"/>	<input type="button" value="▼"/>
Travel books/guides	<input type="text"/>	<input type="button" value="▼"/>
Maps/ atlas/ gazetteer	<input type="text"/>	<input type="button" value="▼"/>
Newsletter from outfitters	<input type="text"/>	<input type="button" value="▼"/>
Paddle club newsletter/message board	<input type="text"/>	<input type="button" value="▼"/>
Other	<input type="text"/>	<input type="button" value="▼"/>

(If you answered other, please specify)

19. In addition to paddling, I also participate in the following outdoor recreation activities...(Check all that apply)

- ☐ Walking/ Running
- ☐ Hiking
- ☐ Mountain biking
- ☐ Road biking
- ☐ Climbing
- ☐ Backpacking/Orienteering
- ☐ Horseback riding
- ☐ Fishing
- ☐ Hunting
- ☐ Birding/Wildlife watching
- ☐ Camping
- ☐ Snow sports
- ☐ Motorized water sports/boating
- ☐ Four-wheel driving/off-roading
- ☐ Other (please specify)

20. Please check the appropriate boxes below to estimate how much money your party spent on your last paddling trip OUTSIDE your local area (50 mile radius).

	<\$50	\$51-100	\$100-149	\$149-200	\$200-300	\$300-400	\$400-500	>\$500	N/A
Airfare	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transportation/Gas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lodging	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Guided trip fees and/or rental equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchased paddling gear	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activities/Entertainment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(If you answered other, please elaborate)

21. Please check the appropriate boxes below to estimate how much money your party spent on your last paddling trip WITHIN your local area (50 mile radius).

	<\$50	\$51-100	\$100-149	\$149-200	\$200-300	\$300-400	\$400-500	>\$500	N/A
Transportation/Gas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lodging	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Guided trip fees and/or rental equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchased paddling gear	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activities/entertainment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(If you answered other, please elaborate)

22. If a web based log (BLOG) were available for monitoring paddling conditions for an area in which you paddle, would you... (Check all that apply)

- ☐ Contribute information to it
- ☐ Use it as a reference
- ☐ Refer it to others
- ☐ Not participate

23. Which of the following would you support as a means for funding improved and increased paddle access? (Check all that apply)

- ☐ Canoe/kayak registration
- ☐ User fees
- ☐ Sales tax on equipment
- ☐ Paddling license
- ☐ None of the above
- ☐ Other (please specify)

24. Do you feel that paddle trail development is a viable form of economic development for North Carolina?

- ☐ Yes, definitely
- ☐ No, not at all
- ☐ I am not sure
- ☐ Maybe (please elaborate)

25. What can we do to improve a visitor's paddling experience in North Carolina?

26. Thank you for taking the N.C. Paddle Trails information survey!

If you have any questions, suggestions, or concerns that were not addressed in this survey, please list them below.

Happy Paddling!

27. If you would like to be entered into the drawing for the \$200 gift card to Great Outdoor Provision Co. or \$200 to a participating outfitter of your choice, please fill out the following contact information. This information will be stored separately from your survey responses so that they remain anonymous.

Name	<input type="text"/>
Preferred Phone	<input type="text"/>
E-mail	<input type="text"/>

Appendix B - Letter to Outfitters



Division of Parks and Recreation

Michael F. Easley, Governor

William G. Ross Jr., Secretary

Lewis R. Ledford, Director

July 8, 2008

Greetings from The State Trails Program:

We are writing to announce the kick-off of a statewide program that will provide beneficial market information to you about paddlers in North Carolina.

Beginning in June, the NC State Trails Program will launch a research project, the NC Paddle Survey, designed to collect information from both resident and non-resident paddlers who enjoy the lakes, rivers and coastal areas of our state. It is our hope that this information will benefit you as you make marketing and management decisions.

The results of the study will offer a local and statewide understanding of travel related to paddling, the characteristics of paddlers, and will determine the economic impacts that paddlers have on various areas of North Carolina. The North Carolina State Trails Program will use the results from this project to promote paddling, enhance paddling experiences, and increase awareness of paddle tourism throughout North Carolina. Additionally and most importantly, this information will be shared with local parks and outfitters so that they might benefit from this important market research.

To this end, we have created an online survey for paddlers to complete and have included a hard copy of the survey for you to review. A link to the NC Paddle Survey is also available at www.ncparks.gov under the "Items of Interest" sidebar.

Please encourage your clients to participate in our online survey. If you agree to partner with us, we will provide you with several tools to gain a large response from, and therefore a good understanding of your customers:

- ✧ an email announcement for you to share with your client mailing list and/or post on your website
- ✧ informational brochures detailing goals of the project that you can distribute to customers interested in the study
- ✧ and finally, sign-up sheets to collect client email addresses of paddlers wishing to participate in the study.



We will also provide you with postage-paid envelopes to return the completed sign-up sheets. Your clients will then be emailed a link to take the brief online survey. Once the study is completed you will receive a copy of the results and will be listed as a contributing partner in this statewide effort.

Our goal is to get as many people as possible to participate in this online survey. The results of this survey will be posted on the State Trails Program Web site in the fall of 2008. We want to make sure that your area is represented, so please consider partnering with us on this important project. In return, you will receive valuable market research at no cost.

Our Project Manager, Jennifer Beedle, will contact you within a week by email or phone to gauge your interest in participating and to answer any questions you may have. Should you wish to reach her, she can be contacted directly at (919) 715-9613 or by email at Jennifer.Beedle@ncmail.net. We hope that you will become a part of this very important effort to gain information about the paddling markets in your area.

Appendix C - Thank You and Instruction Letter to Outfitters

Dear (name),

Thank you for participating in the 2008 NC Paddle Tourism Study. Your involvement with this very important project will provide valuable information on the North Carolina paddling market.

The results of the study will offer a local and statewide understanding of travel related to paddling, the characteristics of paddlers, and will determine the economic impacts that paddlers have on various areas of North Carolina. The North Carolina State Trails Program will use the results from this project to promote paddling, enhance paddling experiences, and increase awareness of paddle tourism throughout North Carolina. Additionally and most importantly, this information will be shared with local parks and outfitters so that they might benefit from this important market research.

Our goal is to get as many people as possible to participate in the Paddle Tourism Survey. The results of this survey will be posted on the State Trails Program Web site in the fall of 2008. Your commitment to partner with us on this important project will ensure that your area is represented. You will also receive valuable market research at no cost.

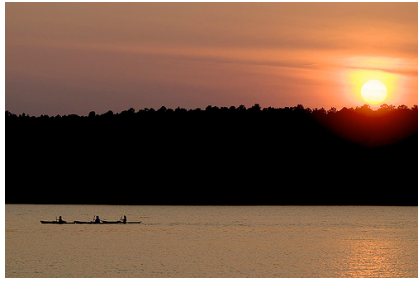
Here's how to help:

- Hand out informational brochures to walk-in customers.
- Collect client email addresses by using sign up sheets provided
- Send us filled out sign up sheets using provided postage paid envelopes—we will then email your clients a link to take the survey

Please find enclosed materials to assist you with encouraging your clients to participate in the survey. Thank you again for your involvement. Please contact Jennifer Beedle with any questions or concerns at 919-715-9613 or by email at Jennifer.beedle@ncmail.net. We'll be in touch to see how things are going.

Thanks for your support!

Appendix D - Paddle Tourism Brochure



Purpose of the Study

The North Carolina State Trails Program is working to gain a local and statewide understanding of travel related to paddling, the characteristics of paddlers, and to determine the economic impacts paddlers may have on various areas of North Carolina.



How You Can Help

We hope that you will participate in an online survey designed to gather information about paddle tourism in North Carolina!

A link to the NC Paddle Survey is available at:
www.ncparks.gov

Under the “Items of Interest” sidebar

Survey participants will be entered into a drawing to win one of the following two prizes:

- ❖ \$200 gift card to Great Outdoor Provision Co.
- ❖ \$200 gift card to a participating outfitter listed on the survey introduction page

Our goal is to get as many people as possible to take the survey.

Survey Outcomes

At the conclusion of the study, the survey results will be shared in a comprehensive report available on the North Carolina State Trails Program website. This report will be helpful in determining what trip qualities are desired by paddlers, and to measure paddlers' economic impact on North Carolina's local communities. The results from the survey will be used to promote paddling, enhance paddling experiences, and increase awareness of paddle tourism throughout North Carolina.



About NC State Trails Program

The State Trails Program is a section of the N.C. Division of Parks and Recreation. The program is dedicated to helping citizens, organizations and agencies plan, develop and manage all types of trails. Our staff is working toward a goal of a statewide trail system by providing technical assistance, offering grant opportunities and developing successful partnerships with local conservation and recreation advocates.

Please visit us at:

http://www.ncparks.gov/About/trails_main.php



NC State Trails Program

NC Division of Parks and Recreation

1615 Mail Service Center

Raleigh, NC 27699-1615

Phone: (919) 715-9613

Fax: (919) 715-3055

E-mail: Jennifer.beedle@ncmail.net

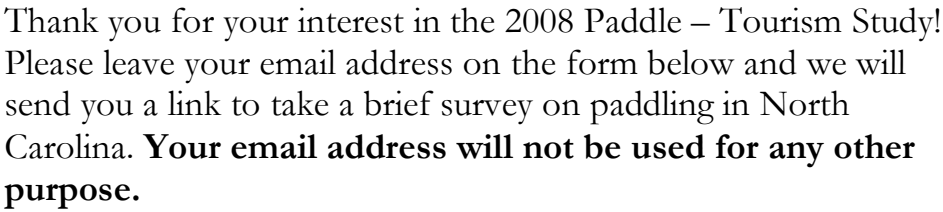
2008 Paddle Tourism Survey



North Carolina
Division of Parks and
Recreation

State Trails Program

Appendix E - Email Sign-Up Sheet

[illegible]

Appendix F - Letter to Parks



Michael F. Easley, Governor

William G. Ross Jr., Secretary

Lewis R. Ledford, Director

Lyndon Sutton
Cliffs of the Neuse State Park
345-A Park Entrance Road
Seven Springs, NC 28578

Dear, Lyndon:

Thank you for participating in the 2008 NC Paddle Tourism Study. Your involvement with this very important project will provide valuable information on the North Carolina paddling market.

The results of the study will offer a local and statewide understanding of travel related to paddling, the characteristics of paddlers, and will determine the economic impacts that paddlers have on various areas of North Carolina. The North Carolina State Trails Program will use the results from this project to promote paddling, enhance paddling experiences, and increase awareness of paddle tourism throughout North Carolina. Additionally and most importantly, this information will be shared with local parks and outfitters so that they might benefit from this important market research.

Our goal is to get as many people as possible to participate in the Paddle Tourism Survey. The results of this survey will be posted on the State Trails Program Web site in the fall of 2008. Your commitment to partner with us on this important project will ensure that your area is represented.

Here's how to help:

- Hand out or make informational brochures available to park visitors.
- Collect park visitor's email addresses by using sign up sheets provided (if applicable).
- Send us filled out sign up sheets using provided postage paid envelopes—we will then email your park visitors a link to take the survey.

Please find enclosed materials to assist you with encouraging your park visitors to participate in the survey. Thank you again for your involvement. Please contact Jennifer Beedle with any questions or concerns at 919-715-9613 or by email at Jennifer.beedle@ncmail.net. We'll be in touch to see how things are going.

Sincerely,

Darrell McBane
State Trails Program Coordinator



Appendix G - Email Letter to DMOs

«Contact_Person»
«Organization_Name»
«Mailing_Address»

Greetings from The State Trails Program:

In June, the NC State Trails Program launched a research project designed to collect information from both resident and non-resident paddlers who enjoy the lakes, rivers and coastal areas of our state. The North Carolina State Trails Program will use the results from this project to promote paddling, enhance paddling experiences, and increase awareness of paddle tourism throughout North Carolina.

To better understand the paddling market, we have created the NC Paddle Survey. This survey will determine what attracts paddlers to waterways across the state, what types of activities they participate in while on paddle trips, the qualities they desire to make their visits more enjoyable, and the economic impact they have on those areas while on paddle trips.

The survey can be accessed by clicking the link below:

A link to the survey is also available at www.ncparks.gov under “Items of Interest”.

We are asking for assistance from destination marketing organizations throughout North Carolina. We hope that you will share information about this effort and survey with your board of directors as well as your community. I have attached an email announcement for you to forward to paddling groups, “friends of” groups, boards, and any additional email lists you believe will be interested. Our goal is to get as many people as possible to participate in this online survey. If you agree to offer your assistance with this very important project, you will be listed as a contributing partner in the report. We will also send you a printed copy of the results.

Please contact our Project Manager, Jennifer Beedle, with any questions you may have. She can be reached by phone at 919-715-9613, or at Jennifer.beedle@ncmail.net. We hope that you will become a part of this very important effort to gain information about North Carolina paddlers.

Appendix H- Survey Link Email Announcement

Greetings and thank you for your willingness to participate in the 2008 Paddle Tourism Survey!

As you may know, the North Carolina State Trails Program is launching a research project designed to collect information from both resident and non-resident paddlers who enjoy the lakes, rivers and coastal areas of our state. We will use the results from this project to promote paddling, enhance paddling experiences, and increase awareness of paddle tourism throughout North Carolina.

The survey will take approximately ten minutes of your time - you can begin by clicking on this link:

http://www.surveymonkey.com/s.aspx?sm=ogSiusYwE3APwc_2fq6Pn3MA_3d_3d

Each respondent will be entered into a drawing for a \$200 gift card to the Great Outdoor Provision Company!

The results of this survey will be posted on the State Trails Program website in the fall of 2008 at www.ncparks.gov under Items of Interest.

Our Project Manager, Jennifer Beedle, will be happy to answer any questions you may have about the survey. She can be reached at Jennifer.Beedle@ncmail.net or by phone at 919-715-9613.

Please share this information with fellow paddlers who may be interested; we would like to hear from as many people as possible.

Thank you.

Appendix I - Frog Hollow Outdoors newsletter

Webfoot e-News

The Paddler's e-Newsletter



eNewsletter

Greetings {FIRST_NAME},

July/August 2008

Welcome to Webfoot e-News! Summer is in full swing, and we hope that you are enjoying some of this beautiful weather in a kayak or canoe! This edition of Webfoot eNews offers up some great summer time activities! From Kayak Rescue Training to great Summer festivals, there's something for everyone. We hope to see you out on the water soon!

- The Frog Hollow Staff

DEEP/OPEN WATER RESCUE INTENSIVE

July 26 - Do yourself and those you paddle with a favor, know how to perform a deep-water rescue. From beginners or advanced paddlers, if you paddle your kayak on any open body of water this class is for you!



[- MORE ABOUT THE OPEN/DEEP WATER RESCUE TRAINING -](#)

IT'S THAT FESTIVAL TIME OF YEAR - 2 Great Events for 2 Great Causes

Festival for the Eno

JULY 4-7 - Presented by the [Eno River Association](#), the Festival features a variety of activities, all with an environmental or

In This Issue

Deep/Open Water Rescue Training

Festival Time of Year - Festival for the Eno and the High Rock Lake Paddlefest

Paddlers Take Action - 2008 Paddle Tourism Survey

Paddler's Eye

Upcoming Classes/Trips

[SUPPORT YOUR LOCAL RIVER TRIP](#) - Haw River at Bynum Dam - AUG 30

[INTRO TO KAYAK CLASSES](#) - JULY 19, AUGUST 1, 16

[TOURING/SEA KAYAK FUNDAMENTALS](#) - AUGUST 2, SEPT 6

[PADDLE UNDER THE STARS with Morehead Planetarium and Science Center](#) - JULY 5 (FULL), AUGUST 1

[NIGHT PADDLES](#) - JULY 18, AUGUST 15

e-News Discounts

[CLICK HERE FOR THIS ISSUES COUPON](#)

cultural connection to the river. The Eno River Association is committed to the preservation of the nature, culture, and history of the Eno River basin.



[- TO LEARN MORE ABOUT THIS EVENT CLICK HERE -](#)

High Rock Lake Paddlefest

Aug 9-10 - This is the first year for this family friendly festival. Along with a wide variety of paddling events there will be availability of all of Camp Walter Johnson's facilities (pool, high ropes course, putt-putt, paddle boats, etc). The Paddlefest is a benefit for Camp Walter Johnson, which is a summer camp for underprivileged children and at risk youth.

[-TO LEARN MORE ABOUT THIS EVENT CLICK HERE -](#)

PADDLERS TAKE ACTION - [2008 Paddle Tourism Survey](#)

The North Carolina State Trails Program is launching a research project designed to collect information from both resident and non-resident paddlers who enjoy the lakes, rivers and coastal areas of our state. This is a follow-up study on a survey conducted in 2006. The results from this project will be used to promote paddling, enhance paddling experiences, and increase awareness of paddle tourism throughout North Carolina.

The survey will take approximately ten minutes of your time - you can begin by [CLICKING HERE](#)

Each respondent will be entered into a drawing for a \$200 gift card to the Great Outdoor Provision Company! And the results of the survey will be posted on the NC Parks website in the fall of 2008 at www.ncparks.gov under Items of Interest.

If you should have questions about the study, Project Manager, Jennifer Beedle, will be happy to answer them. She can be reached at Jennifer.Beedle@ncmail.net or by phone at 919-715-9613.

Frog Hollow in the News

In case you missed it last month, we made our way into two national publications in the same month!



[National Geographic Adventure](#) - "Next Weekend - Instant Adventures"

[US News and World Report](#) - "10 Brainiest Places to Retire"

Tell Your Story

Do you have an unusual, informative or interesting NC paddling, or water related story, or photo you'd like to share? If so, submit it to Webfoot e-News and we'll consider it for an upcoming newsletter. To submit visit the [Frog Hollow website](#) and send us an email.

Please share this information with fellow paddlers both inside and outside North Carolina.

PADDLER'S EYE

A photo for a moments pause to kindle inspiration, desire, reflection...
This months photos - **"You have got to be kidding"**

[- TO VIEW THIS EDITIONS PHOTO CLICK HERE -](#)

[Forward to a friend](#) | [Copyright Info](#) | [Address](#) | [Privacy Policy](#)

Appendix J – GET:OUTDOORS newsletter

If images do not appear [click here](#) for web based version.

GET:OUTDOORS

Formerly Pro Canoe & Kayak

800-450-6819
336-294-3918

The Ultimate Kayak Keeps Getting Better



Rotomolded Poly
\$879.00



Lightweight Tegriskayak
\$1,999.00



Multisport Pedal Drive
\$2,130.00

...add one to your tackle box

Make Transporting Your Kayak A Breeze



Rack & Roll Trailer



Small Air Cart



Nemo Cart



Scupper Pup

Get Organized With On-Deck Storage



Kayak Dashboard



Kayak Console



Angler Work Deck



Deluxe Deck Bag

Oak Hollow Lake Kayak Demo This Weekend

What better way to pick out your new kayak than trying it? Come try out the latest kayaks and enjoy a refreshing paddle on the lake. Our knowledgeable staff and instructors will be

**Try the all New
Native Watercraft Pedal Drive**

on hand to answer any questions you may have.

[Click Here for more information and directions](#)

Saturday, July 19th ~ 11am - 3pm

at the demo this weekend



Full Moon Paddle - July 19th



Join us on our first Full Moon Paddle of 2008 & enjoy a relaxing afternoon and night on the water. See the sunset and moonrise as never before, from a kayak. The fee for this trip is \$30 per person and includes: a kayak, PFD, a paddle, and an experienced guide to show you all the exciting things a nighttime paddle has to offer. Space is limited so call to sign up now or [Click Here](#) for more information. Location: Belews Lake, Greensboro.

Take the NC Paddle Trails Survey and be entered to win a \$200 Gift Card



If images do not appear [click here](#) for web based version.

GET:OUTDOORS

Formerly Pro Canoe & Kayak

800-450-6819
336-294-3918

Native Watercraft Pedal Drive Now In-Stock



Ultimate MultiSport™ with

propel™
pedal drive

Now In-Stock - Click Here

Independence Day Specials All Week



WILDERNESS SYSTEMS

Tarpon 130T Kayak

Reg: \$800

Sale: \$700.00

In-stock items only, cannot be combined with any other offers, or package deals



15% OFF
Astral Norge PFD's



20% OFF
The North Face Duffels



20% OFF
The North Face Clothing

Lake Higgins Kayak Demo This Weekend

What better way to pick out your new kayak than trying it? Come try out the latest kayaks and enjoy a refreshing paddle on the lake. Our knowledgeable staff and instructors will be on hand to answer any questions you may have.

[Click Here for more information and directions](#)

Saturday, July 5th ~ 11am - 3pm

**Be the first to try the all New
Native Watercraft Pedal Drive
at the demo this weekend**



Now In Stock - Click Here

Full Moon Paddle - July 19th



Join us on our first Full Moon Paddle of 2008 & enjoy a relaxing afternoon and night on the water. See the sunset and moonrise as never before, from a kayak. The fee for this trip is \$30 per person and includes: a kayak, PFD, a paddle, and an experienced guide to show you all the exciting things a nighttime paddle has to offer. Space is limited so call to sign up now or [Click Here](#) for more information. Location: Belews Lake, Greensboro.



Take the NC Paddle Trails Survey

This survey is being conducted by the North Carolina State Trails Program along with NC State University as a follow up to the 2006 paddle trail development survey. The information obtained from these questions will be used to gain a local and statewide understanding of travel related to paddling, the characteristics of paddlers, and to determine the economic impacts paddlers may have on various areas of North Carolina.

Each respondent will be entered into a drawing for a \$200 gift card. [Click Here](#) to begin the survey.